

## For Customer Service & Support

Foster Customer Loyalty. Drive Repeat Business.

### Key Benefits

- Gain visibility into service and support team performance to guide resource decisions
- Manage service team professionals and provide them with the tools they need to help customers quickly
- Reduce workload by automating simple processes and using web-based self-service
- Foster lasting, rewarding customer relationships by keeping the lines of communication open and efficient

*“We have been using Maximizer Enterprise since v1.0 – we couldn’t have grown our business without it. Most recently, with improved customer service & support functionality, it has improved service response times by 50%.”*

*- Warren Mathusek, President,  
Mathusek Inc.*

Servicing customers effectively and efficiently can secure repeat business. Whether it’s answering a question, resolving an issue, or modifying a product to meet user needs, customer satisfaction levels are critical to your bottom line. Maximizer Enterprise™ 9.5, a proven, adaptable Customer Relationship Management (CRM) solution, provides customer service and support managers with the ability to optimise service resources and frontline service representatives to dramatically increase productivity and improve customer satisfaction.

### Optimise Resources and Witness Productivity Gains

- Resolve issues faster with easy access to complete customer account information in one central location. Records of previous communications - including emails, notes from phone calls, and staff observations - are clearly sorted so you don’t have to waste time. You can even access the customer’s credit status and purchase history in Maximizer Enterprise when you use the Accounting Link for Intuit® QuickBooks®.<sup>1</sup>
- Effectively track, manage and resolve all your post-sales customer issues, including technical support, billing and returns.
- Create customer service cases complete with details you can track and search on including case number, queue, product, category, assignment and more.
- Minimise errors with pre-filled fields in the customer case form. Allow service team staff to quickly add details before moving to the next call.
- Reduce data entry time with quick case creation based on incoming email.
- Update or re-assign multiple cases quickly with global editing.
- Respond faster and improve call productivity with enhanced computer telephony integration (CTI) that enables you to automatically identify inbound callers and handle outbound calls directly from Maximizer Enterprise.
- Staff anywhere can review and resolve customer service cases with access through the desk or web-based Employee Portal.<sup>2</sup>

### Keep Customer Satisfied, Loyal and Profitable

- Build successful one-on-one relationships with each customer by responding faster. With all the sales and customer service information you need at your fingertips, you can quickly give them accurate answers to their questions. Record all your communications inside Maximizer Enterprise so anyone can effectively respond to their next call.
- Serve customers better by reducing the time they spend waiting in a phone queue. With the ability to search, handle and resolve issues faster, your customer service representatives can serve customers sooner and take more calls per hour.



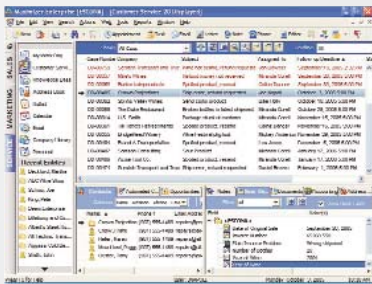
- Make the best use of specialised knowledge by assigning cases based on expertise. Inform representatives of new assignments with automatic email alerts.
- Track case assignments and escalation to ensure every issue is resolved and that customer satisfaction remains high. Use Workflow Automation, powered by KnowledgeSync, to set up automatic notification of overdue cases and other critical incidents<sup>3</sup>.

### Automate Processes to Ensure High Quality Service

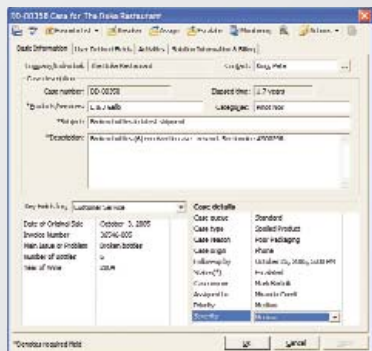
- Automatically respond to critical business activities and monitor staff performance with Maximizer Enterprise Workflow Automation, powered by KnowledgeSync, to ensure every customer service case gets the attention it deserves<sup>3</sup>.

Examples:

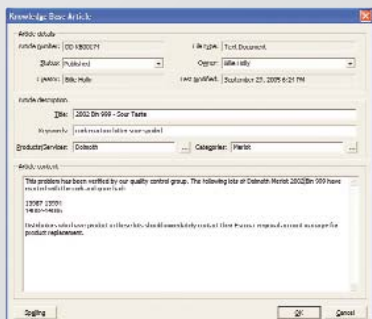
- ✓ Make sure customers get the support they deserve by tracking expiration dates of service level agreements and sending renewal notices.
- ✓ Search your database for overdue or stalled cases every Monday morning and send email alerts to the relevant customer support managers and assigned customer service representative (CSR).
- ✓ Send an alert to the customer support manager and the appropriate account manager when more than four cases are entered for one customer in a given week.
- ✓ Monitor incoming emails for keywords and automatically create customer service cases based on intelligent tracking of message content.



**Case Management: Effectively track and resolve issues such as technical support, billing, and returns.**



**Case Management: Create customer service cases, quickly capturing critical information on each issue.**



**Knowledge Base: Resolve issues faster with quick access to centralised information.**

### Gain Insight into Customers and Staff to Improve Service

- Instantly view details of all outstanding cases, including elapsed time, priority level and status, by representative. Visualise CSR case workloads and analyse cases to effectively balance workload and ensure total customer satisfaction.
- See a high-level, real-time visual snapshot of your department and the company's performance including outstanding cases, through key indicators in the Dashboard to see which areas are doing well and which areas need attention<sup>2</sup>. Then drill-down to the Crystal Reports<sup>®</sup> to identify the details.
- Get real-time updates with over 175 standard reports, including Overdue Cases by CSR, Case Assignment and Case Billing. Then export reports to Excel<sup>®</sup> for deeper analysis.
- Create your own reports with Crystal Reports XI Professional by Business Objects<sup>®</sup>, the world's leading reporting tool bundled with Maximizer Enterprise, to gain further visibility into trends.
- Automatically email weekly reports to managers<sup>4</sup>, or trigger reports<sup>3</sup> and alerts based on critical performance indicators, such as when cases are more than 14 days overdue, or when a CSR reaches case overload status.
- Use the information gathered in post-sales cases to enable executives to analyse areas for improvement and requirements for additional product development.

### Escalate Cases and Notify the Right People

- Ease customer's worries by automatically notifying them that their issue has been escalated to a senior or more knowledgeable representative.
- Keep account managers informed of case escalation with automatic email alerts so they can effectively manage their accounts and know when to call on their important customer.

### Take Advantage of Opportunities to Cross-sell and Up-sell

- Get an accurate and current picture of customer activities - no matter where your teams are located - by sharing one interface and one central customer list with marketing and sales. See all activities in the account record, including marketing campaigns and sales opportunities in progress, to know which additional products and services to promote.
- Effectively eliminate data duplication and errors that can occur when you have separate programs for marketing automation, sales force automation and your helpdesk.

## Provide Self Service to Reduce Workload

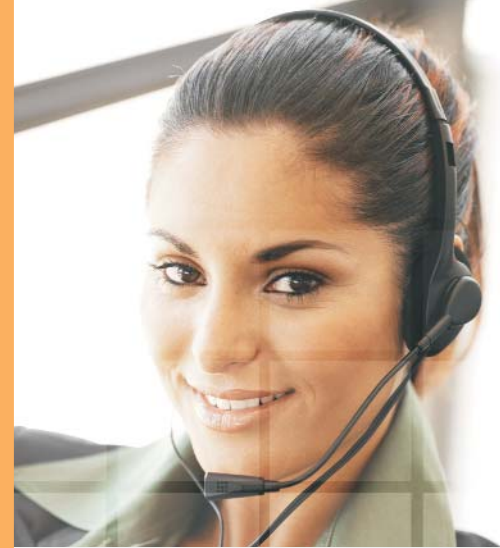
- Reduce calls to representatives by giving customers and partners the ability to search your online Knowledge Base for product updates and answers to FAQs<sup>5</sup>.
- Allow customers and partners to create and check the status of their cases themselves through the secure Customer Portal or Partner Portal<sup>5</sup>.

## Resolve Issues Faster

- Many customers ask the same questions and have the same problems. Avoid duplicating effort by arming your representatives with access to updated, detailed product information in the Knowledge Base. Answers to many customer issues are a click away with fast keyword searching.
- Share successful incident resolutions and product-specific details with other representatives. Let any staff member create a Knowledge Base article, complete with links to detailed documents, spreadsheets and files, for your approval. Enforce management sign-off before publishing the information.

## Track Defects and Inform Customers of Fixes or Recalls

- Easily configure specific case-related fields to track details of customer problems, such as product application or model number. Use this information to analyse the need for improvements and additional product development.
- Easily search for customers who had specific problems or made specific requests to send them a notice when product fixes are available or when products are recalled.

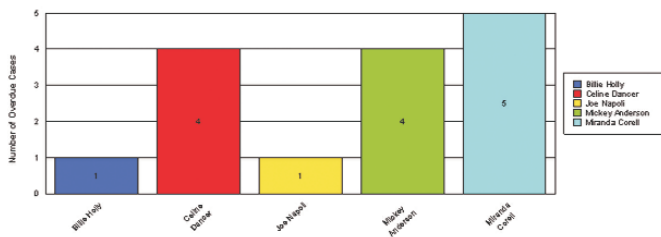


*“Using Maximizer Enterprise for our customer support and ticket tracking has greatly improved our support process. Using custom automated solutions, we are able to handle incoming email and web based support requests and tie them directly to support requests within Maximizer Enterprise. This saves the support representatives substantial time and reduces data entry errors. All of this keeps us moving toward our goal of providing world-class customer support for all our products.”*

*- Matt Disher, CIO,  
Seapine Software, Inc.*

### Customer Service Overdue Cases Report

Overdue Cases by Customer Service Representative



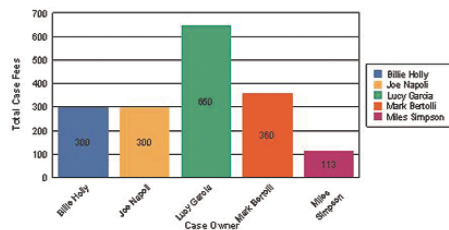
### Summary

Customer Service Representative	# of Cases
Billie Holly	1
Celine Dancoer	4
Joe Napoli	1
Mickey Anderson	4
Miranda Cosell	5

**Reports:** Instantly view report productivity levels, case status, case billing, and more, with out-of-the-box reports.

### Customer Service Report - Case Billing

Cases Resolved between 9/1/2005 and 9/30/2005



<sup>1</sup>Workflow Link for Quickbooks is an add-on product.

<sup>2</sup>Web access & Dashboard available only in eCRM Suite.

<sup>3</sup>Requires Workflow Automation add-on product.

<sup>4</sup>Requires Crystal Reports Server add-on product.

<sup>5</sup>Customer & Partner Portal available only in eCRM Suite.



## 9 Reasons that make Maximizer Enterprise Better.

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer management software

## For More Information

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### Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will out perform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

### About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

### Maximizer Enterprise works with technology from the following partners



### Awards



Authorised Maximizer Partner

**Maximizer**  
The CRM Company [www.max.co.uk](http://www.max.co.uk)

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